

**SAMS/HfA Training**  
**Social Assistance Management System**  
**for Aging**

**AAA & ADRC LTSS**  
**Support**



**SPURS Project**

**Department of Aging and**  
**Disability Services (DADS)**

## **Introduction**

This reference manual provides “quick reference” information for State Unit on Aging Programs Uniform Reporting System (SPURS) users in AAA or ADRC organizations and is a supplement to the SAMS User Training for the Long-term Services and Support Level 1 Screening (LTSS).

- When completing LTSS activities, log in to the Mediware Portal using the Mediware User ID assigned. If you are a AAA employee but also responsible for ADRC activities, in order to record ADRC activities that should not be counted as AAA activities you must log in to SAMS using your ADRC Mediware and SAMS user ID and password for the ADRC-related activities.
- Log in to SAMS.
- Complete Information Referral and Assistance activities.
- View Referrals.
- Run reports:
  - LTSS Assessment Report.

It is assumed users of this Job Aid are familiar with the structure of Consumer Records in SPURS, as well as DADS’ client intake and service delivery documentation requirements.

## ***Illustrations and Graphics***

Screen shots provided in this manual may show a view or system configuration that is slightly different from the screens and configuration in use at your organization.

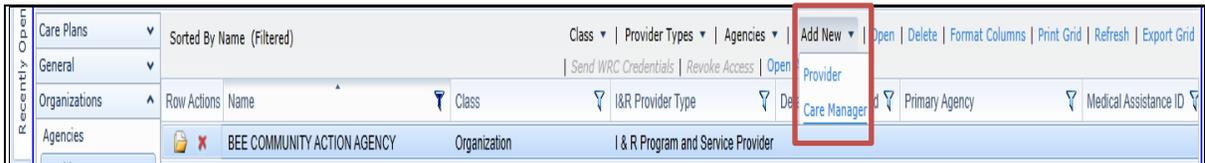
## ***Additional Resources***

This training manual only provides a general overview for LTSS referral and assessment data in SAMS. It does not attempt to provide complete system information.

*For questions, please contact the DADS Help Desk at AAA.HELP@dads.state.tx.us*

To assign referrals to a Care Manager, System Administrators will need to ensure the Care manager is set up in SAMS.

1. Click on **Administrator**
2. Under the **Organizations** tab click on **Provider**
3. Click on **Add New** and select **Care Manager**



4. Populate the highlighted information on the following screen and click **Save and Close** when complete.

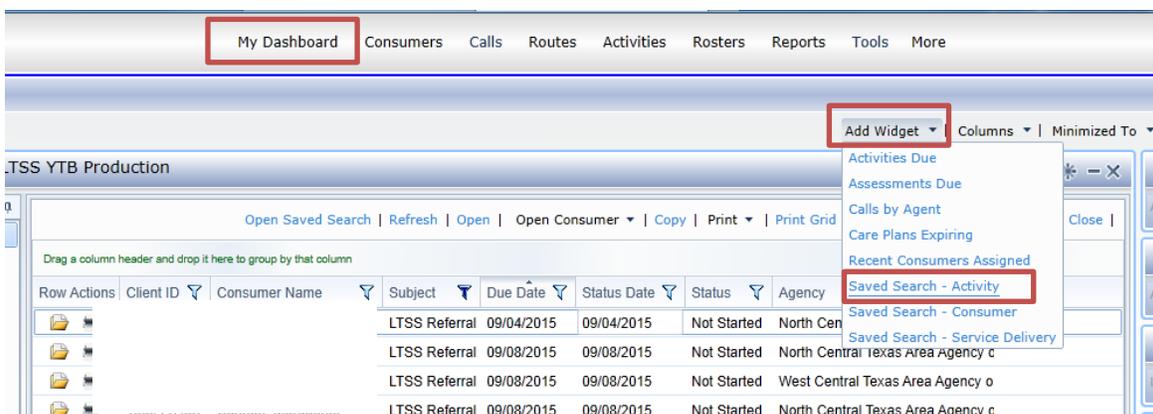
A screenshot of the 'Administrator - Providers' form. A red box highlights the input fields for personal and agency information, including First Name, Last Name, MI, DOB, Details Last Reviewed, Primary Agency, SSN, Gender, Medical Assistance ID, Start Date, and End Date. The form also includes sections for Agencies, Contacts, Locations, Phones, Provider Types, Roles, Services, Sites, and Subproviders, each with an 'Add New' button. The 'Services' section is also highlighted with a red box.

## Accessing and Completing Referrals & the LTSS Assessment in SAMS

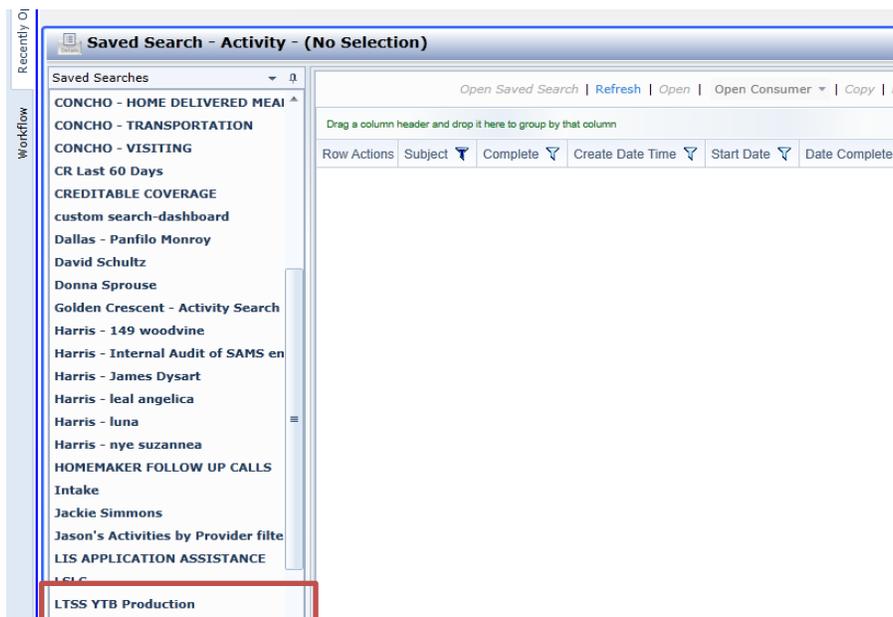
The Long-term Services and Support (LTSS) Level 1 Screening Assessment form housed within SAMS will be automatically populated from the Your Texas Benefits environment and is located in the **Assessments** section of a client Record.

The referral will appear in the Dashboard and can be accessed through the following steps:

- Click on **'My Dashboard'**
- Click on Add Widget. In the Add Widget dropdown select **'Saved Search Activity'**

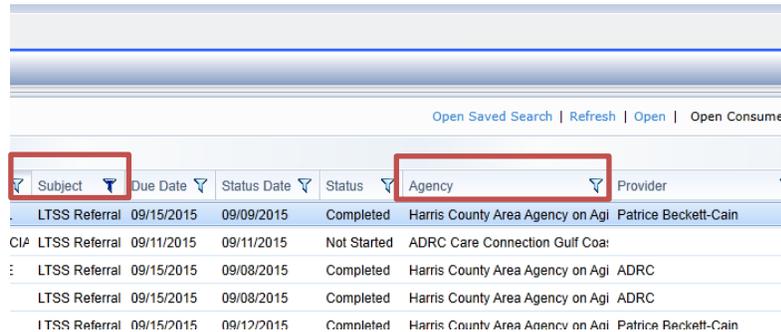


- A navigation pane on the left will appear containing the **'LTSS YTB Production'** Saved Search, click on it and referrals will appear in the dashboard.



The results will yield **all** referrals including but not limited to LTSS referrals that have imported from the YTB environment.

- To locate only the referrals for a specific agency, filter the **'Agency'** column to your agency and filter the **'Subject'** column to "LTSS"



Open Saved Search | Refresh | Open | Open Consumer

Subject	Due Date	Status Date	Status	Agency	Provider
LTSS Referral	09/15/2015	09/09/2015	Completed	Harris County Area Agency on Agi	Patrice Beckett-Cain
CIA LTSS Referral	09/11/2015	09/11/2015	Not Started	ADRC Care Connection Gulf Coa:	
LTSS Referral	09/15/2015	09/08/2015	Completed	Harris County Area Agency on Agi	ADRC
LTSS Referral	09/15/2015	09/08/2015	Completed	Harris County Area Agency on Agi	ADRC
LTSS Referral	09/15/2015	09/12/2015	Completed	Harris County Area Agency on Agi	Patrice Beckett-Cain

**Several key items to note:**

- You only need to work referrals for your specific AAA or ADRC agency
- You may see a referral for a different agency and this is due to the Agency that is reflected within the Consumer Record. If the referral you are accessing is shaded in gray when opened, it does not belong to your agency and therefore no action is required.
- Once a referral has been worked and no further action is required, update the **'Status'** to Complete by placing a checkmark in the **'Complete'** column.
- The Dashboard filters and displays results for all clients where the default agency indicated in the Consumer Details section matches the agency value for your log-in account. This can result in LTSS referrals for multiple agencies being displayed.

## **Viewing Referrals and Assessment Questions on the Consumer Record:**

In SAMS, open the Consumer record and click on **Activities and Referrals**.

Please note the following **KEY** fields:

- Subject
- Action
- Agency
- Status
- Status Date
- Start Date
- Due Date
- Follow-up Status

The screenshot displays the SAMS interface for a referral record. The title bar shows 'Activity/Referral - Referral, LTSS Referral (Due 8/5/2015)'. The main content area is divided into two sections: 'Activity/Referral - Referral, LTSS Referral (Due 8/5/2015)' and 'Comments'. The 'Activity/Referral' section contains the following fields:

- Subject:** LTSS Referral
- Action:** Referral
- Agency:** West Central Texas Area Agency on Aging
- Provider:** (empty)
- Care Program:** (empty)
- Status:** Not Started
- Reason:** (empty)
- Status Date:** 8/5/2015
- Due Date:** 8/5/2015
- Start Date:** Enter date
- Start Time:** Enter date
- Date Completed:** Enter date
- Time Completed:** Enter date
- Follow-Up Status:** Not Required

The 'Comments' section contains the following text:

External Comments:

Referral Reason:  
Tricare, Veteran

Authorized Representative:  
Name

Below the comments is a 'Services' section with an 'Open' button.

- **Subject – LTSS Referral** is the value that will be populated and should not be modified. The subject line is the only method in which to identify the referrals coming from the Your Texas Benefits (YTB) Interface.
- **Action – Referral** is the value that will be populated.
- **Agency** - the YTB interface will populate the AAA or ADRC values based on the zip code entered within the YTB portal and identify the initial owner of the referral.

- **Provider** - the provider field is not populated by the YTB interface therefore the Agency / ADRC personnel must populate this field if necessary. This is not a required field.
- **Status field – Not Started** is the default value that will be populated by the YTB interface, and the AAA / ADRC personnel will be responsible for updating this value. The frequency and duration the referral should remain open (versus closed / completed) is not yet determined.
- **Caution- if the referral status is modified within SAMS it will NOT be updated in the YTB environment. All the changes to the referral stay local to the SPURS environment.**
- **Status Date and Due Date** – the YTB interface will populate both values with the create date in the YTB environment, and the AAA / ADRC personnel will be responsible for updating this value if necessary.
- **Start date**- this field will populate by the YTB interface with the create date in the YTB environment, similar to the Status and Due Date fields.
- **Follow-up Status – Not Required** is the default value that will be populated by the YTB interface. The AAA / ADRC personnel have the ability to change this value if necessary and this field is optional.

## Assigning Referrals to a Care Manager within your Agency

- Open the Referral
- Under the Provider drop down menu select the appropriate Care Manager
- Click Save and Close

Workflow

Recently Opened

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels

**Consumer**

**Subject** LTSS Referral

**Action** Referral

**Agency** Harris County Area Agency on Aging

**Provider**

**Subprovider**

**Care Program**

**Site**

**Status**

**Reason**

**Status Date**

**Due Date**

**Start Date** 9/23/2015

**Start Time** 2:46 AM

**Date Completed**

**Time Completed**

**Follow-Up Status** Not Required

**Follow-Up Date**

**Follow-Up Time**

[Format Property List](#)

Originated By: Texas Department of Aging and Disability Creator: Ltss Web

**Comments**

YTB Referral ID: 12526

External Comments:

Referral Reason:  
Age 60 or older

Authorized Representative  
Name: DSHS CMBHS

**Services**

### **ADRC Users Assigning Referrals to an external Agency**

- Open the Referral
- Under the Agency drop down menu select the appropriate Agency you wish to send the referral to. (Once the referral is sent to an external agency, that referral will appear in the external agency's dashboard and that agency will assign a Provider or Care Manager responsible for working the referral.)
- Click Save and Close

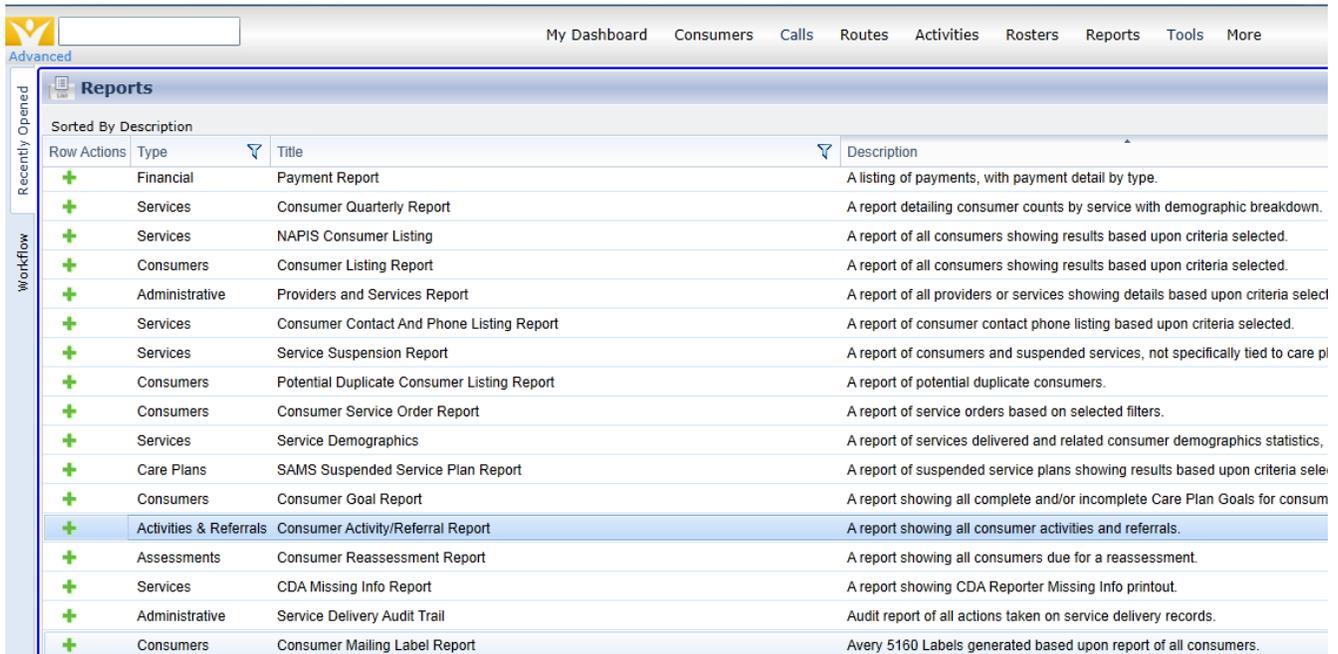
Several Important Notes regarding AAA and ADRC User Functionality:

- ADRC Users can modify caller records only where the default consumer agency listed is their ADRC.
- If an existing consumer has been referred to an ADRC, service deliveries from other agencies will be visible however cannot be modified.
- Referrals can be sent by an ADRC to any agency that is actively receiving referrals within the SAMS environment.
- Users with dual AAA and ADRC log-in credentials to SAMS will need to log-in under the agency in which they wish to complete the activity. This is to separate the ADRC and AAA activities for data entry and reporting purposes.

## Reports

There are several report options available to review the LTSS referrals. The first is the Consumer Activity Referral Report found in the Reports menu within SAMS.

### Consumer Activity Referral Report



The screenshot shows the SAMS Reports menu. The menu is titled 'Reports' and is sorted by Description. The menu items are as follows:

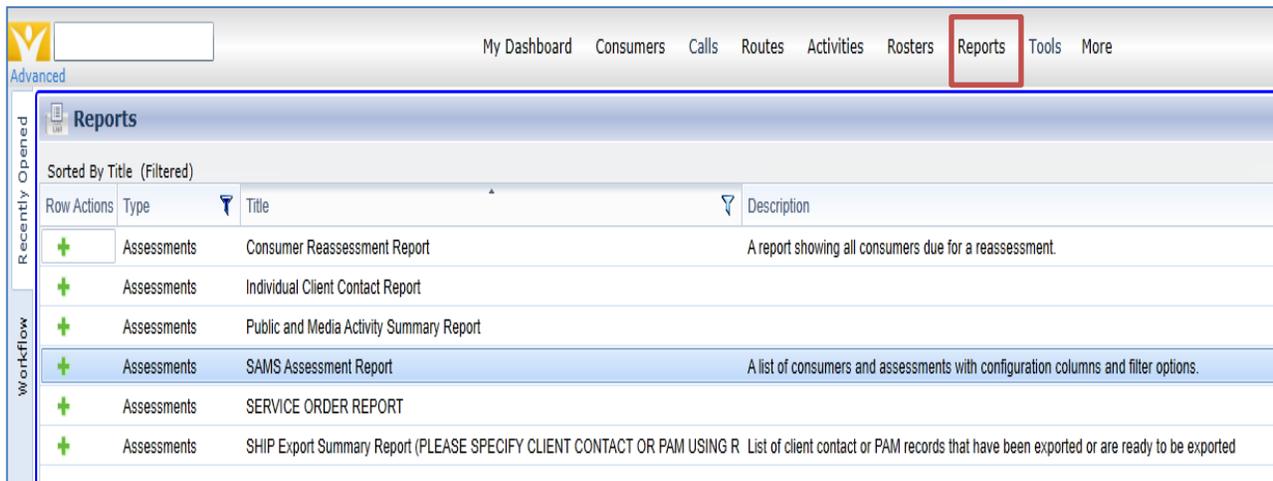
Row	Actions	Type	Title	Description
+		Financial	Payment Report	A listing of payments, with payment detail by type.
+		Services	Consumer Quarterly Report	A report detailing consumer counts by service with demographic breakdown.
+		Services	NAPIS Consumer Listing	A report of all consumers showing results based upon criteria selected.
+		Consumers	Consumer Listing Report	A report of all consumers showing results based upon criteria selected.
+		Administrative	Providers and Services Report	A report of all providers or services showing details based upon criteria select
+		Services	Consumer Contact And Phone Listing Report	A report of consumer contact phone listing based upon criteria selected.
+		Services	Service Suspension Report	A report of consumers and suspended services, not specifically tied to care pl
+		Consumers	Potential Duplicate Consumer Listing Report	A report of potential duplicate consumers.
+		Consumers	Consumer Service Order Report	A report of service orders based on selected filters.
+		Services	Service Demographics	A report of services delivered and related consumer demographics statistics,
+		Care Plans	SAMS Suspended Service Plan Report	A report of suspended service plans showing results based upon criteria sele
+		Consumers	Consumer Goal Report	A report showing all complete and/or incomplete Care Plan Goals for consum
+		Activities & Referrals	Consumer Activity/Referral Report	A report showing all consumer activities and referrals.
+		Assessments	Consumer Reassessment Report	A report showing all consumers due for a reassessment.
+		Services	CDA Missing Info Report	A report showing CDA Reporter Missing Info printout.
+		Administrative	Service Delivery Audit Trail	Audit report of all actions taken on service delivery records.
+		Consumers	Consumer Mailing Label Report	Avery 5160 Labels generated based upon report of all consumers.

#### Report Filter Settings:

- Activity/ Referral: Select Referral Under the Action folder  
Select the Agency
- Care Managers: Select the Care Manager(s) from the list

## LTSS Assessment Activity Report

Start with the SAMS Assessment Report by clicking on **Reports**. Set Parameters below as indicated. Parameters may be adjusted to meet individual agency needs.



Row Actions	Type	Title	Description
+	Assessments	Consumer Reassessment Report	A report showing all consumers due for a reassessment.
+	Assessments	Individual Client Contact Report	
+	Assessments	Public and Media Activity Summary Report	
+	Assessments	SAMS Assessment Report	A list of consumers and assessments with configuration columns and filter options.
+	Assessments	SERVICE ORDER REPORT	
+	Assessments	SHIP Export Summary Report (PLEASE SPECIFY CLIENT CONTACT OR PAM USING R	List of client contact or PAM records that have been exported or are ready to be exported

### Report Filter Settings:

- Sort by: Assessment Form
- First Group by: Assessment Form
- Include Consumers without Assessments: No
- Service Delivery Service: Assessments
- Form Name Contains: LTSS
- Care Manager: Select Care Manager from List

## Viewing Assessment Questions (Screenings) from the Dashboard Referral

- Access the referral in the SAMS Dashboard

The screenshot shows the SAMS Dashboard interface with a table of referrals. The table has columns for Town of Residence, Home Phone, Action, Subject, Due Date, Date Completed, and Status. The first row is highlighted in blue.

Town of Residence	Home Phone	Action	Subject	Due Date	Date Completed	Status
Houston	(713) 681-3713	Referral	LTSS Referral	09/08/2015		Not Started
Lott	(254) 584-0021	Referral	LTSS Referral	09/04/2015		Not Started
Luling	(830) 875-6231	Referral	LTSS Referral	09/08/2015		Not Started
Midway	(936) 525-7699	Referral	LTSS Referral	09/03/2015		Not Started
Gainesville	(940) 695-4607	Referral	LTSS Referral	09/08/2015		Not Started
Laredo	(956) 712-8048	Referral	LTSS Referral	09/04/2015		Not Started
Edgewood	(803) 896-4065	Referral	LTSS Referral	09/09/2015		Not Started
Martindale	(515) 664-4393	Referral	LTSS Referral	09/09/2015		Not Started

- Highlight the Consumer Referral and double click to Open

The screenshot shows the SAMS Dashboard interface with a consumer referral details form. The form includes fields for Consumer Name, Subject, Action, Agency, Provider, Status, and Reason. The Status is set to 'Not Started' and the Reason is 'Age 60 or older'. The Date is 9/8/2015.

**Consumer Referral - Referral, LTSS Referral (Due 9/8/2015)**

Consumer Name: [Redacted]

Subject: LTSS Referral

Action: Referral

Agency: Harris County Area Agency on Aging

Provider: [Redacted]

ibprovider: [Redacted]

Program: [Redacted]

Site: [Redacted]

Status: Not Started

Reason: [Redacted]

Reason Date: 9/8/2015

**Comments**

External Comments:

Referral Reason:  
Age 60 or older

Authorized Representative:  
Name: DSHS CMBHS

**Services**

- Click on the Consumer Name and then click Assessments. The assessments for the consumer will appear. Click on the LTSS Screening or Open to view the assessment questions and answers.

The screenshot shows the SAMS Dashboard interface with a consumer assessment table. The table has columns for Date of Assessment, Next Assessment Date, Assessor Name, Last Updated, Updated By, Assessment Form, Agency, Provider, and Care Program. The first row is highlighted in blue.

# Actions	Date of Assessment	Next Assessment Date	Assessor Name	Last Updated	Updated By	Assessment Form	Agency	Provider	Care Program
09/08/2015	03/08/2016	DSHS-CMB	9/8/2015 7:45:06 PM	Web, Ltss	LTSS Screening	Harris County Area Agency on Aging			

## To Create a Saved Search

1. CLICK ACTIVITIES
2. CLICK SAVED SEARCHES AND SELECT ADD NEW FROM THE DROPDOWN MENU.

The screenshot shows the 'Activities & Referrals' dashboard. At the top, the navigation menu includes 'My Dashboard', 'Consumers', 'Calls', 'Routes', 'Activities', 'Rosters', 'Reports', 'Tools', and 'More'. The 'Activities' menu item is highlighted with a red box. Below the navigation, the dashboard title is 'Activities & Referrals'. The main content area shows a table with columns for 'Row Actions', 'Complete?', and 'Subject'. The 'Subject' column contains two rows, both labeled 'LTSS Referral'. To the right of the table, there is a 'Saved Searches' dropdown menu. The 'Add New' option in this dropdown is highlighted with a red box. Other options in the dropdown include 'Refresh', 'Activity', 'anon', and 'Authorized escort'.

3. POPULATE SEARCH PARAMETERS. WHEN COMPLETE, CLICK SAVE AND CLOSE.
4. CLICK ON "DASHBOARD" TO ACCESS THE SAVED SEARCH.
5. CLICK ON "ADD WIDGET", THEN "SAVED SEARCH ACTIVITY" AND THE SAVED SEARCH WILL APPEAR IN THE SAVED SEARCHES TOOL PANE ON THE LEFT.

The screenshot shows the 'Jaime Pomponio's Dashboard'. The dashboard title is 'Jaime Pomponio's Dashboard'. Below the title, there is a 'Saved Search - Activity - Jaime Dashboard' widget. The widget has a 'Saved Searches' dropdown menu on the left and a table of results on the right. The 'Saved Searches' dropdown menu is open, showing a list of saved searches including 'CONCHO - HOME DELIVERED MEAL', 'CONCHO - TRANSPORTATION', 'CONCHO - VISITING', 'CR Last 60 Days', 'CREDITABLE COVERAGE', 'custom search-dashboard', 'Dallas - Panfilo Monroy', 'David Schultz', 'Donna Sprouse', 'Golden Crescent - Activity Search', 'Harris - 149 woodvine', 'Harris - Internal Audit of SAMS en', 'Harris - James Dysart', 'Harris - leal angelica', 'Harris - luna', 'Harris - nye suzannea', 'HOMEMAKER FOLLOW UP CALLS', 'Intake', 'Jackie Simmons', 'Jaime Dashboard', 'Jason's Activities by Provider filte', 'LIS APPLICATION ASSISTANCE', and 'LSLC'. The 'Jaime Dashboard' option is highlighted. The table of results has columns for 'Row Actions' and 'Subject'. The 'Subject' column contains 15 rows, all labeled 'LTSS Referral'.